

## DEPARTMENT OF INSURANCE

PRODUCER LICENSING BUREAU, EDUCATION SECTION

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**CALIFORNIA TAX QUALIFIED LONG-TERM CARE,  
CALIFORNIA PARTNERSHIP & WORKERS COMPENSATION  
CONTINUING EDUCATION REQUIREMENTS**

**CALIFORNIA TAX QUALIFIED REQUIREMENTS (TQ)**

**A. For fire and casualty broker-agent and life agents:**

**I. Obtaining authority to solicit the sale of Long Term Care Insurance:**

- A.** Prior to being authorized to solicit individual consumers for the sale of Long Term Care Insurance, each licensee must complete a specifically designated TQ course.

**II. Maintaining authority to solicit the sale of Long Term Care Insurance:**

- A.** Licensees required to complete 25 approved credit hours for each of the first four 12-month periods, and wish to solicit the sale of Long Term Care insurance, must complete an 8-hour specifically designated TQ course once during each 12 month period.
- B.** Licensees required to complete 30 approved credit hours for each two-year license term, and wish to solicit the sale of Long Term Care insurance, must complete an 8-hour specifically designated TQ course once during each two-year license term.

EXAMPLE License issued 3/15/97:

25 CE hours – 8 hour TQ (3/97 - 3/98)  
25 CE hours – 8 hour TQ (4/98 - 3/99) RENEW 3/99  
25 CE hours – 8 hour TQ (4/99 - 3/2000)  
25 CE hours – 8 hour TQ (4/2000 - 3/2001) RENEW 3/2001  
30 CE hours – 8 hour TQ (4/2001 - 3/2003) RENEW 3/2003

**III. Licensees that are exempt from continuing education**

**A. Non-resident license holders:**

- I.** All non-residents who wish to solicit the sale of Long Term Care insurance in California must complete a TQ course once during each two-year license term.

**B.** Licensees who are 70 years of age **AND** 30 consecutive years licensed in good standing in California (SB380):

- I.** All licensees exempt from continuing education, who wish to solicit the sale of Long Term Care insurance in California, must complete a TQ course once during each two year license term.

#### **CALIFORNIA PARTNERSHIP FOR LONG-TERM CARE REQUIREMENTS (PR)**

**A.** For fire and casualty broker-agents and life agents:

**I.** Obtaining authority to solicit individual consumers for the Partnership product:

- A.** Prior to being authorized to solicit individual consumers for California Partnership for Long Term Care, each licensee must complete one specifically designated TQ course and one specifically designated PR course.

**II.** Maintaining authority to solicit individual consumers for the Partnership product:

- A.** Licensees required to complete 25 approved credit hours for each of the first four 12-month periods, and wish to solicit the sale of California Partnership for Long Term Care insurance, must complete an 8-hour specifically designated TQ course each year. This must be accompanied by either a 4-hour specifically designated PR course every 12-month period or an 8-hour specifically designated PR course every two-year license term.
- B.** Licensees required to complete 30 approved credit hours for each two-year license term periods, and wish to solicit the sale of California Partnership for Long Term Care, must complete an 8-hour specifically designated TQ each two-year license term. This must be accompanied by an 8-hour specifically designated PR course every two-year license term.

#### **TWENTY-FOUR HOUR CARE COVERAGE (WC)**

**A.** For life agents:

**I.** Required hours:

- A.** Prior to being authorized to sell this product (as defined in CIC 1749.02), life agents must complete a specifically designated 4-hour WC course.